



One state. One system.

Working smarter & connected

California's financial
management system





One state. One system.

User Community Forum

June 15, 2016

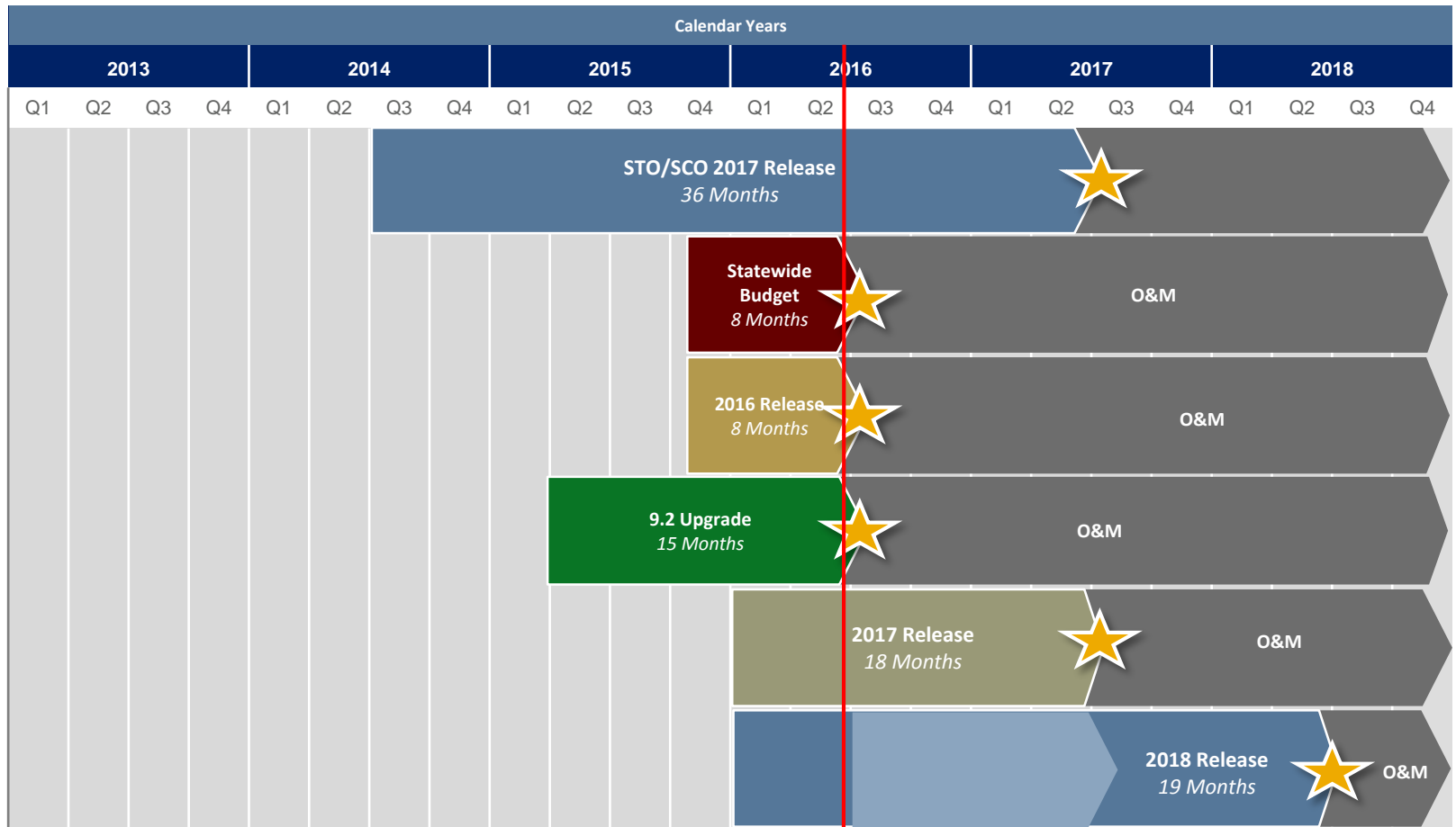


Mike Muth

FI\$Cal Communications Manager

Agenda

- Project Status
- Tips & Tricks: Role of the Super User
- FI\$Cal Service Center – *What we've heard from you*
- Close



Michael Muth

FI\$Cal Readiness Manager (Acting)

Super Users Roles & Expectations

- As a Super User, you may want to:
 - Make yourself visible within your department
 - Encourage your department users to come to you with questions and problems
 - Send out an email or communication introducing yourself as a resource for your department
 - Create a communication path within your department and obtain management buy-in

Know Where to Find FSC Information

- FI\$Cal Service Center (FSC) information and resources can be found online:
 - Contact Information
 - End User Access Forms
 - Workstation Configuration Guide
 - Configuration Modification Request Form
 - Help videos on [how to access FI\\$Cal](#) or [reset your password](#)
- **Navigation:** *FI\$Cal Home Page > Access FI\$Cal > [Access FI\\$Cal Service Center Information](#)*

Know Where to Find FTA Information

- The FI\$Cal Training Academy (FTA) provides training resources, e.g. Instructor-led and Web-based training, Learning Programs tied to roles, and User Productivity Kits (UPKs)
- **Navigation:** *FI\$Cal Home Page > Access FI\$Cal > Access FI\$Cal Training Academy > [FI\\$Cal Training Academy Login](#)*

Know Where to Find FTA Information

- FI\$Cal Job Aids are step-by-step instructions on how to complete specific transactions in FI\$Cal not covered in the FTA
- **Navigation:** *FI\$Cal Home Page > Access FI\$Cal > Access FI\$Cal Training Academy > FI\$Cal End User Supplemental Job Aids and Training Tips*

Helpful Resources

- The Department of Finance (DOF) announced in [Budget Letter 16-06](#) a new accounting training program for accountants learning FI\$Cal
- DOF has also posted accounting terminology and reporting crosswalks as well as other training resources on their [FI\\$Cal resources page](#)
- **Navigation:** *FI\$Cal Home Page* > [Finance's Resources Webpage](#)

How to Manage Configuration

- Configuration Ownership Matrix is a reference tool to aid departments in completing configuration updates:
 - *Module (Business Processes)*
 - *Configuration Item Name*
 - *Description (description of the Configuration Item)*
 - *Change Requestor (who can submit a request)*
 - *Change Approver (who can approve a request)*
 - *Change Coordinator (who can configure the request)*
 - *Source of Change (environment the request is configured in)*
- **Navigation:** *FI\$Cal Home Page > Access FI\$Cal > Access FI\$Cal Service Center Information*

How to Run Reports (for All Modules)

- Training on how to run reports and view financial statements for modules can be accessed through the FI\$Cal website.
- **Navigation:** *FI\$Cal Home Page > Access FI\$Cal > Access FI\$Cal Training Academy > FI\$Cal Training Academy Log-In > Training Course: RPT101*
Introduction to Reporting
- **Training Course:** RPT101

Comparing CSCR and BidSync

- California State Contracts Register (**CSCR**) and State Contract & Procurement Registration System (**SCPRS**) **training** provides simulated system transactions and guided instructions and covers the following topics:
 - SCPRS and CSCR Overview
 - FI\$Cal SCPRS Processing
 - FI\$Cal CSCR Processing
 - Progress Payments
 - Searching in FI\$Cal
- **Navigation:** *FI\$Cal Home Page > Resources > Fall Release*

How to Use a P-Card

- P-Card is replacing Cal-card, allows departments to transact with vendors, and is another method for departments to procure goods and services.
- The P-Card will have a holder, approver and a maintainer role
- **Navigation:** *FI\$Cal Home Page > Access FI\$Cal > Access FI\$Cal Training Academy > FI\$Cal Training Academy Log-In > Training Course: [PO226 Using P-Cards](#)*
- **Training Course:** [PO226](#)

How to Determine if a Vendor is Open for Ordering

- In order to transact with a vendor, the vendor must be in the vendor management file (VMF). The VMF is the master file that holds vendor records for the State.
- **Navigation:** *FI\$Cal Home Page > Access FI\$Cal > Access FI\$Cal Training Academy > AP101: Entering a New Supplier Request and Updating a Supplier Record*
- **Training Course:** AP101

How to Approve a Voucher

- Workflow process allows an approver to review vouchers before they are submitted for payment or posted to GL. Vendor invoices entered into a voucher must have all fields entered correctly.
- **Navigation:** *FI\$Cal Home Page > Access FI\$Cal > Access FI\$Cal Training Academy > [AP101: Approving a voucher](#) and [AP123: Voucher Workflow](#)*
- **Training Course:** [AP101](#) and [AP123](#)

Questions for Current Super Users

- What are some of the common questions you heard before and after Go Live?
- What are some of the things new Super Users should do to prepare for Go Live, whether that is 2016 or 2017/2018?

Wes Riley

Assistant Deputy Director, FI\$Cal Service Center

What We've Heard from You

“Tickets are taking too long”

- We agree; growing the capacity of the FI\$Cal Service Center
 - Many new staff to better serve you
 - More on-site L1 staff
 - Phone calls will only roll offshore during off-hours
- Status Update: 18 new positions posted
- Call for password resets

What We've Heard from You




Customer Service Survey Too Lengthy

- Reduced Survey Length from 11 to 3 questions:
 - Was your issue resolved by the FI\$Cal Service Center representative
 - Overall, I was satisfied with the service I received: (1-5 scale)
 - Comments
- Implementation Confirmed 05/23
- Also removed filters to give more opportunities for feedback

Your Feedback is Valuable!

- Customer Satisfaction Survey Metrics Last 90 Days (3/23/16 – 05/23/16)
- 239 responses from 2736 survey invitations sent
- Response rate 8.74%

Was your issue resolved by the FI\$Cal Service Center representative?
(Each Respondent could choose only **ONE** of the following options:)




| Response | Total | % of Total Respondents | % |
|-----------------------------|-------|---|-----|
| Yes | 182 |  | 76% |
| No | 57 |  | 24% |
| Total Responses: 239 | |  | |

Your Feedback is *Very* Valuable!

- Customer Satisfaction Survey Metrics 5/23 to 6/07
- 68 responses from 966 survey invitations
- Response rate 7.04%

Was your issue resolved by the FI\$Cal Service Center representative?

(Each Respondent could choose only **ONE** of the following options:)






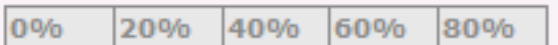
| Response | Total | % of Total Respondents | % |
|----------------------------|-------|---|-----|
| Yes | 58 |  | 85% |
| No | 10 |  | 15% |
| Total Responses: 68 | |  | |

What We've Heard from You

- Overall Satisfaction Rate **4.0**
- 03/23/16 to 05/23/16

Overall, I was satisfied with the service I received.

(Each Respondent could choose only **ONE** of the following options:)






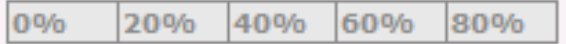
| Response | Total | % of Total Respondents | % |
|-----------------------------|-------|---|-----|
| Strongly Agree 5 | 81 |  | 34% |
| Agree 4 | 73 |  | 31% |
| Neither Agree or Disagree 3 | 38 |  | 16% |
| Disagree 2 | 26 |  | 11% |
| Strongly Disagree 1 | 21 |  | 9% |
| Total Responses: 239 | |  | |

What We've Heard from You

- Overall Satisfaction Rate **4.0**
- 05/23/16 to 06/07/16

Overall, I was satisfied with the service I received.

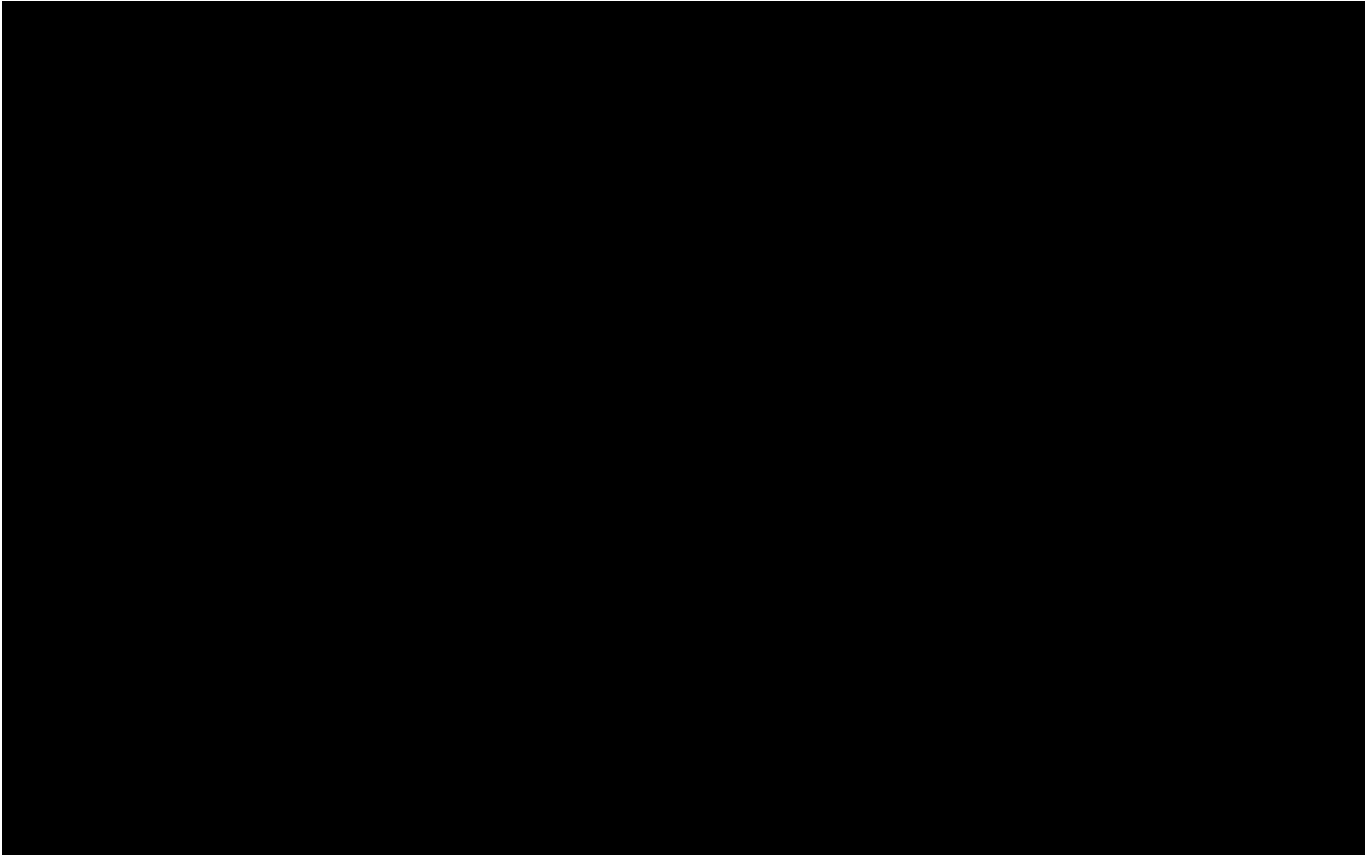
(Each Respondent could choose only **ONE** of the following options:)

| Response | Total | % of Total Respondents | % |
|-----------------------------|-------|---|-----|
| Strongly Agree 5 | 28 |  | 41% |
| Agree 4 | 19 |  | 28% |
| Neither Agree or Disagree 3 | 10 |  | 15% |
| Disagree 2 | 3 |  | 4% |
| Strongly Disagree 1 | 8 |  | 12% |
| Total Responses: 68 | |  | |

What We've Heard from You

- Now we can see what you see when you see it
- FSC Screen Sharing Tool: WebEx
- No local install required
- More secure than screen shots
- On demand or scheduled
- You remain in control

FSC Screen Sharing Tool





Questions

